

## ***Energy Control Procedure***

This standard requires that energy control procedures be developed, documented and used to control potentially hazardous energy whenever workers perform activities covered by the standard. The written procedures must identify the information that the authorized employees must know to control hazardous energy during servicing or maintenance. If this information is the same for various machines or equipment or if other means of logical grouping exists, then a single energy control procedure may be sufficient. If there are other conditions—such as multiple energy sources, different connecting means or a particular sequence that must be followed to shut down the machine or equipment—then the employer must develop separate energy control procedures to protect employees.

The energy control procedures must outline the scope, purpose, authorization, rules and techniques that will be used to control hazardous energy sources as well as the means that will be used to enforce compliance. At a minimum, they should include, but not be limited to, the following elements:

- A statement on how the procedures will be used;
- The procedural steps needed to shut down, isolate, block and secure machines or equipment;
- The steps designating the safe placement, removal and transfer of lockout/tagout devices and who has the responsibility for them;
- The specific requirements for testing machines or equipment to determine and verify the effectiveness of locks, tags and other energy control measures; and
- The employer or an authorized employee must notify affected employees before lockout or tagout devices are applied and after they are removed from the machine or equipment.

The procedures must include the following steps: 1. preparing for shutdown, 2. shutting down the machine or equipment, 3. isolating the machine or equipment from the energy source(s), 4. applying the lockout or tagout device(s) to the energy-isolating device(s), 5. safely releasing all potentially hazardous stored or residual energy, and 6. verifying the isolation of the machine or equipment prior to the start of servicing or maintenance work.

In addition, before lockout or tagout devices are removed and energy is restored to the machines or equipment, certain steps must be taken to reenergize equipment after servicing is completed, including: 1. ensuring that machines or equipment components are operationally intact; 2. ensuring that all employees are safely positioned or removed from equipment; and 3. ensuring that lockout or tagout devices are removed from each energy-isolating device by the employee who applied the device. (See sections 6(e) and 6(f) of 29 CFR Part 1910.147 for specific requirements of the standard.)

## ***Energy-Isolating Devices***

The employer's primary tool for providing protection under the standard is the energy-isolating device, which is the mechanism that prevents the transmission or release of energy and to which locks or tags are attached. (See Glossary for a more complete definition.) This device guards against accidental startup or the unexpected re-energization in machines or equipment during servicing or maintenance. There are two types of energy-isolating devices: those capable of being locked and those that are not. The standard differentiates between the existence of these two conditions and the use of tagout when either condition exists.

When the energy-isolating device cannot be locked out, the employer must use tagout. Of course, the employer may choose to modify or replace the device to make it capable of being locked out. When using tagout, the employer must comply with all tagout-related provisions of the standard and, in addition to the normal training required for all employees, must train his or her employees in the following limitations of tags:

- Tags are essentially warning devices affixed to energy-isolating devices and do not provide the physical restraint of a lock.
- When a tag is attached to an isolating means, it is not to be removed except by the person who applied it, and it is never to be bypassed, ignored or otherwise defeated.